PROC343: Procurement Approvals

Web Based Training

Revised 8/12/2013

Welcome

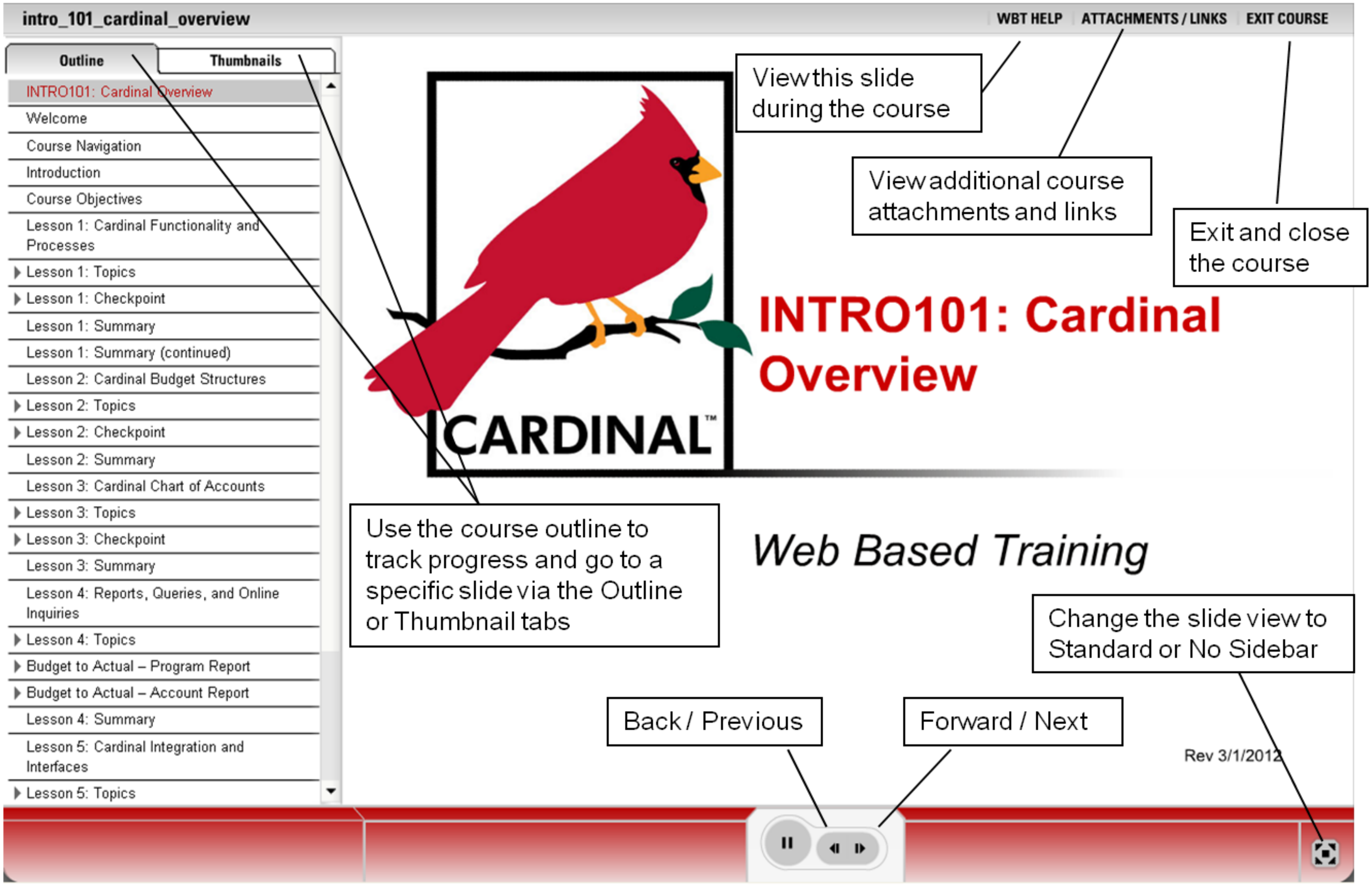
Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will show you Procurement approvals.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed.

Course Navigation



Course Objectives

In the course, we will discuss the following topics:

- Requisition Approval
- WebIMS Requisition Approval
- Purchase Order and Change Order Approval
- Strategic Sourcing Event Collaboration
- PCard Approval
- ISSP Approval
- Procurement Contract Approval

Lesson 1: Requisition Approval

A request for approval is triggered when a user (Purchase Requisition Processor) submits a Regular or WebIMS Restock requisition for approval.

Cardinal sends each approver an e-mail notification when a requisition is ready for approval processing. All requisitions that require approval processing also appear on the worklist.

The approver can approve the requisition from the worklist link, from the email notification link, or from the **Manage Requisition Approvals** page.

Requisition Approval (continued)

Requisitions require two levels of approval:

- **Supervisor:** The Purchase Requisition requester's supervisor is the first level of approval, unless it is entered by the requestor's supervisor. This approver can approve or deny the requisition.

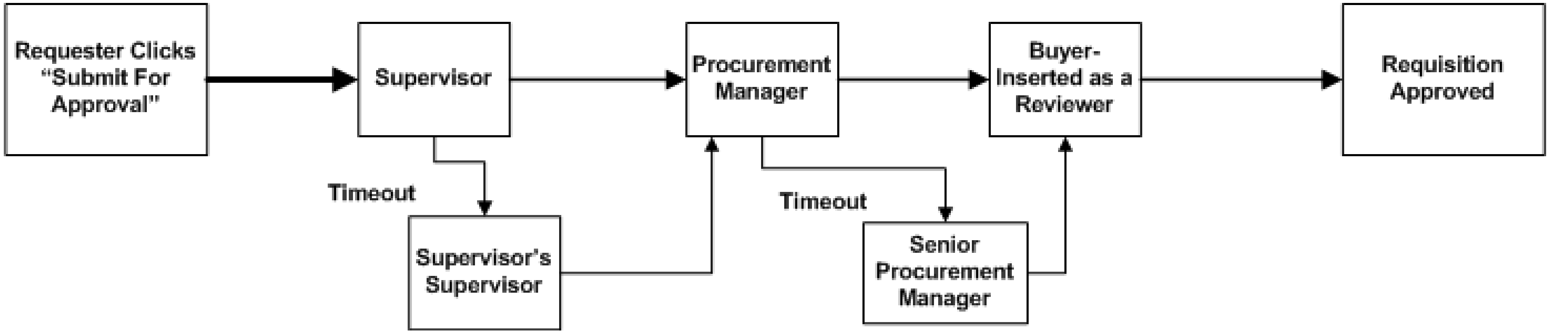
  - If the requisition is entered by the requestor's supervisor, it goes to the supervisor's supervisor for approval. If the requisition is not approved within 48 hours, workflow routes the requisition to the next level supervisor.

  - Approvers can add other relevant users as ad-hoc approvers or reviewers.

Requisition Approval (continued)

- **Procurement Manager:** Once the first level (Supervisor level) approves the requisition, it routes to the Procurement Manager for approval. This approver can approve or deny the requisition.
  - Procurement Managers are part of a pooled approvers list. A requisition that requires approval at the second level of approval is directed to all of the approvers in that pool. Any approver in the pool can take action on the requisition; the requisition approval appears on all of their worklists. When one of the approvers completes an action on the requisition, it is removed from all of the approvers' worklists, since it has been worked.
  - If the requisition is not approved within 48 hours, the approval request times out at the second level (Procurement Manager) and routes to the Senior Procurement Manager. This approver can choose to approve or deny the requisition.
  - Approvers also have the ability to add other relevant users as ad-hoc approvers or reviewers.
  - **Procurement Managers are required to insert the Buyer as a reviewer before clicking the Approve button.**
  - After final approval, the Purchase Requisition Processor user who entered the requisition (Entered By) receives an email notification as well as a worklist item showing the approval. . The same is also sent to the requisition requester.

Requisition Approval (continued)



Requisition Approval Steps

Requisitions are approved either from the worklist link, from the email notification link, or from the **Manage Requisition Approvals** page. You can navigate to the worklist through the following path:

Main Menu > Worklist > Worklist

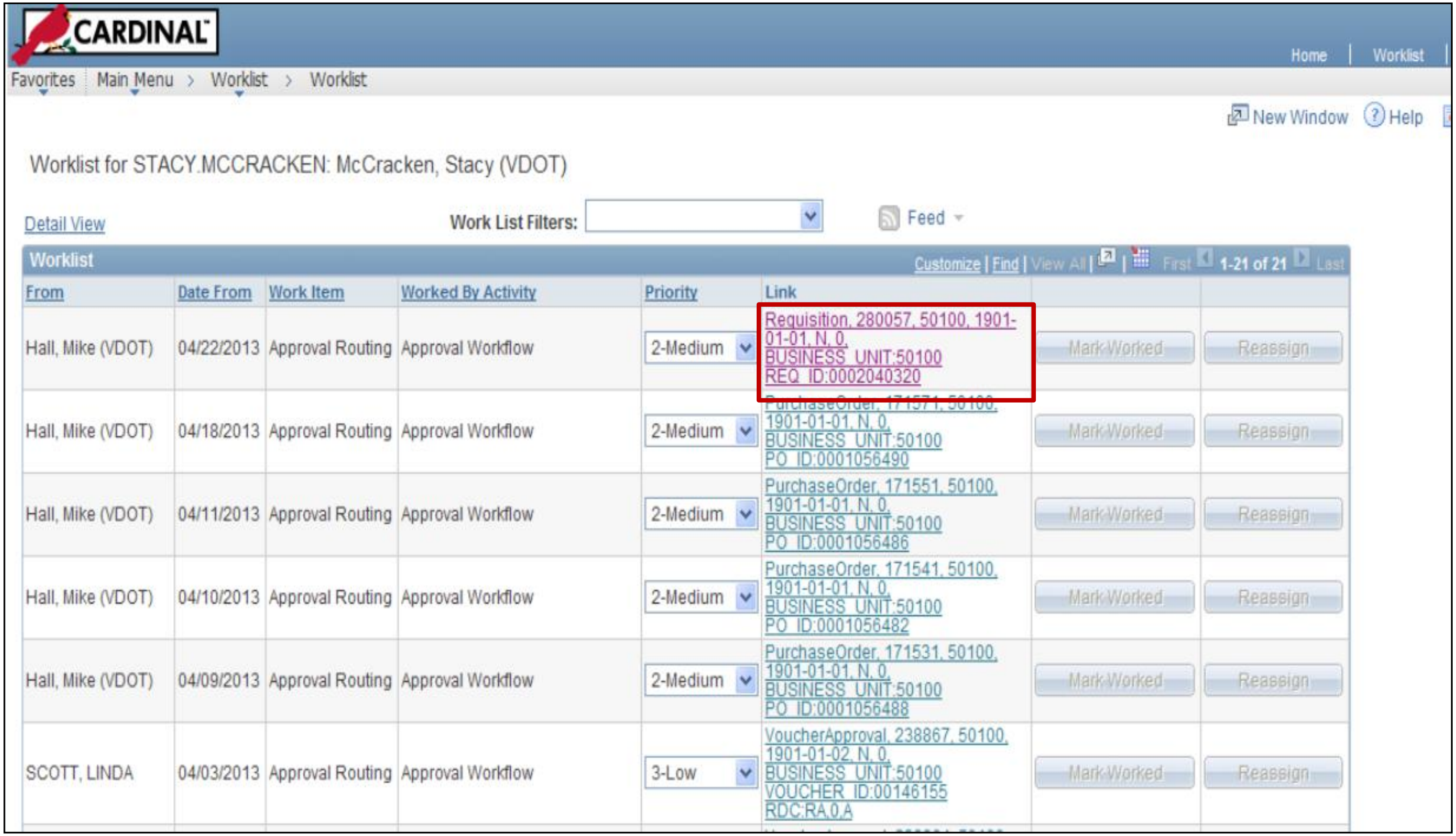
The steps to approve a requisition from the worklist are:

- Click the link on the worklist for the requisition you need to approve.
- Review the requisition carefully by selecting the line(s) you need to review and by clicking the **View Line Details** button to see additional details. Review all details based on relevant policies
- Click **on Review/Edit Approvers** to view and or edit selected Approvers or Reviewers.
- To approve, click the **Approve** button.
- To deny a requisition, click the **Deny** button. If the requisition is denied, the approver must add comments. The user (Entered By) is then notified by email and worklist item, and given the option to cancel the requisition, or modify and re-submit. An e-mail is also sent to the requisition requestor. After a denied requisition is edited, saved, and re-submitted, it goes through the entire approval process again.

The **Manage Requisition Approvals** page can be accessed through the following path:

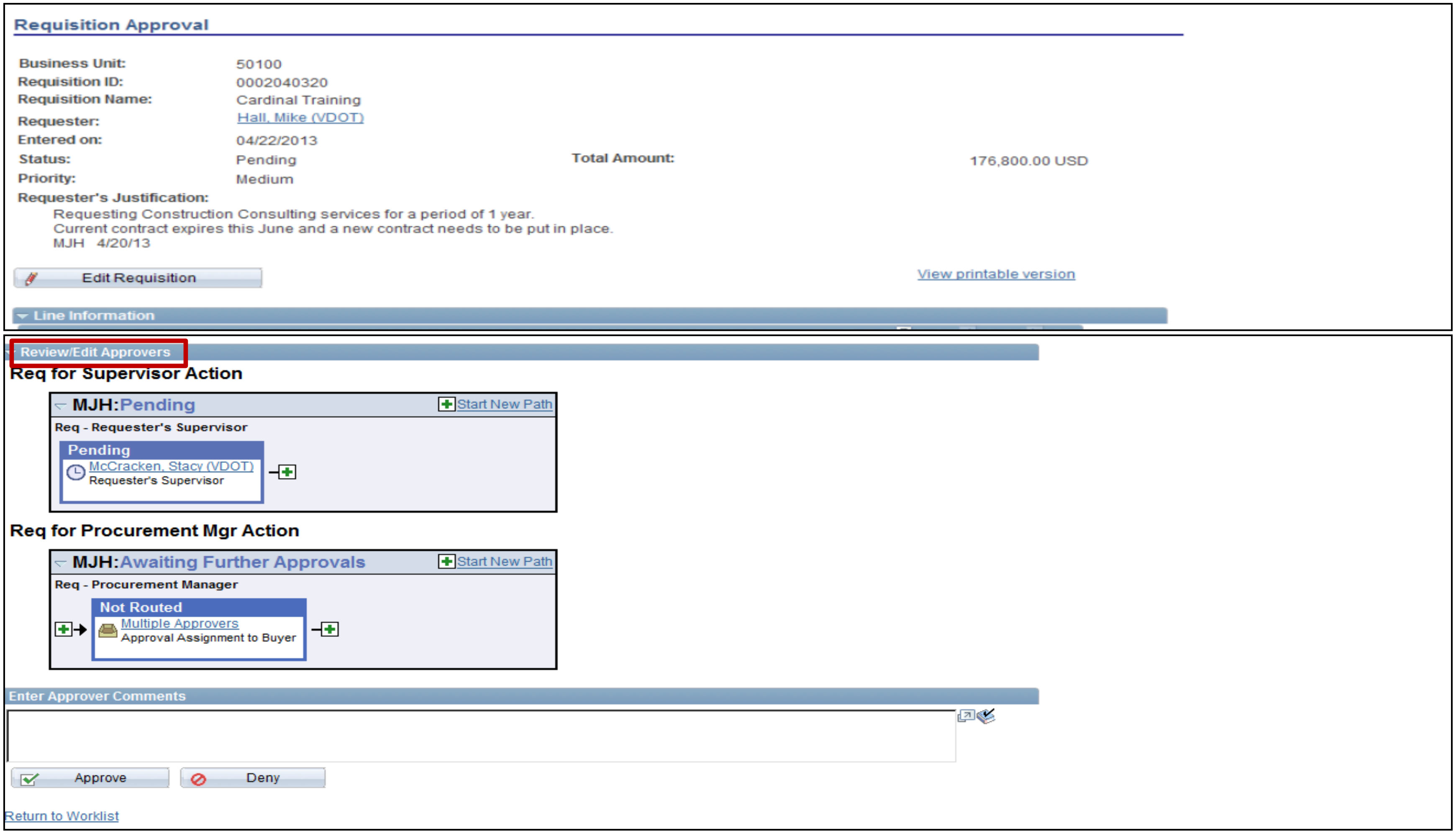
Main Menu > Purchasing > Requisitions > Manage Requisition Approvals

Requisition Approval Steps (continued)



From	Date From	Work Item	Worked By Activity	Priority	Link		
Hall, Mike (VDOT)	04/22/2013	Approval Routing	Approval Workflow	2-Medium	Requisition, 280057, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 REQ_ID:0002040320	Mark Worked	Reassign
Hall, Mike (VDOT)	04/18/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 171571, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001056490	Mark Worked	Reassign
Hall, Mike (VDOT)	04/11/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 171551, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001056486	Mark Worked	Reassign
Hall, Mike (VDOT)	04/10/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 171541, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001056482	Mark Worked	Reassign
Hall, Mike (VDOT)	04/09/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 171531, 50100, 1901-01-01, N, 0, BUSINESS_UNIT:50100 PO_ID:0001056488	Mark Worked	Reassign
SCOTT, LINDA	04/03/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 238867, 50100, 1901-01-02, N, 0, BUSINESS_UNIT:50100 VOUCHER_ID:00146155 RDC:RA,0,A	Mark Worked	Reassign

Requisition Approval Steps (continued)



Requisition Approval

Business Unit:	50100		
Requisition ID:	0002040320		
Requisition Name:	Cardinal Training		
Requester:	Hall, Mike (VDOT)		
Entered on:	04/22/2013		
Status:	Pending	Total Amount:	176,800.00 USD
Priority:	Medium		

Requester's Justification:

Requesting Construction Consulting services for a period of 1 year.
Current contract expires this June and a new contract needs to be put in place.
MJH 4/20/13

Edit Requisition

View printable version

Line Information

Review/Edit Approvers

Req for Supervisor Action

MJH:Pending — Start New Path

Req - Requester's Supervisor

Pending
McCracken, Stacy (VDOT)
Requester's Supervisor

Req for Procurement Mgr Action

MJH:Awaiting Further Approvals — Start New Path

Req - Procurement Manager

Not Routed
Multiple Approvers
Approval Assignment to Buyer

Enter Approver Comments

Approve

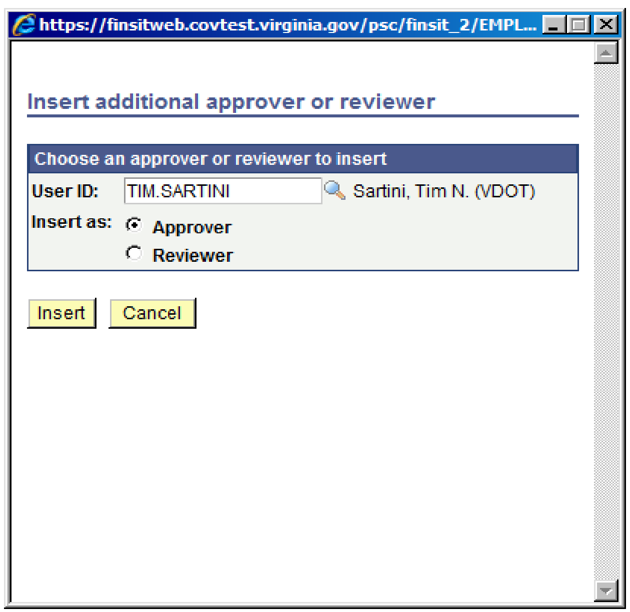
Deny

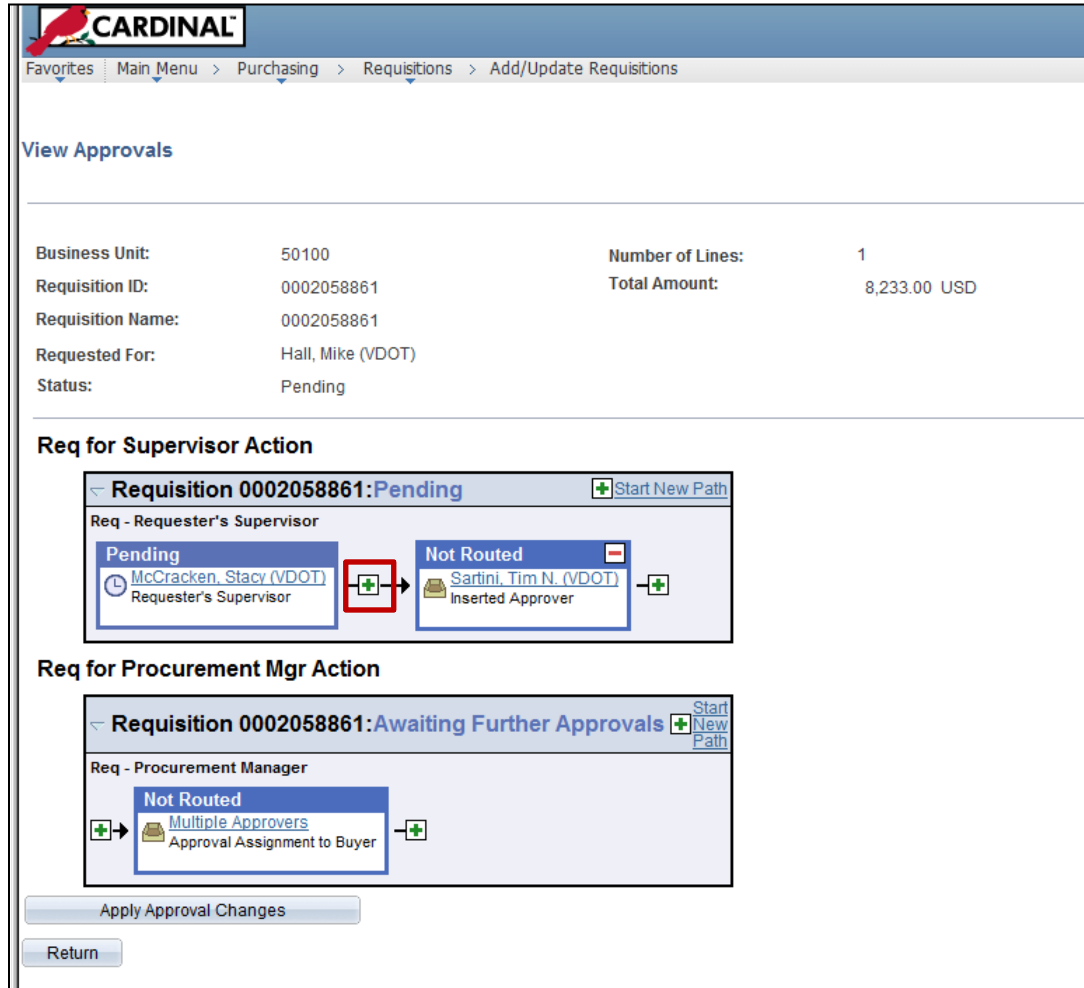
Return to Worklist

Requisition Approval Steps (continued)

To select and add an **Approver** or **Reviewer,** click on the green plus sign icon.

The selected user is inserted into the approval flow as shown.

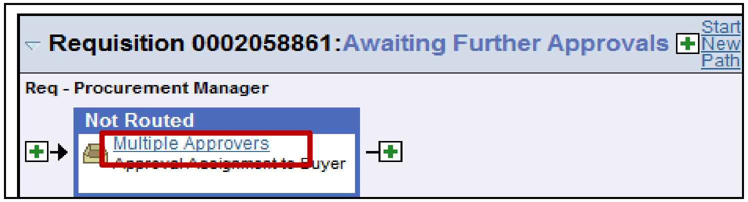


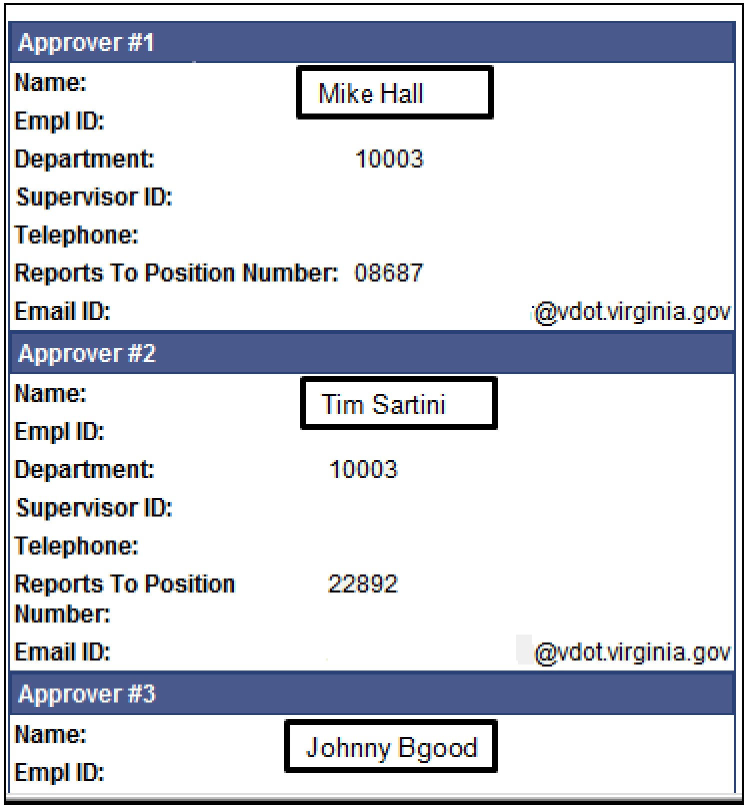


Requisition Approval Steps (continued)

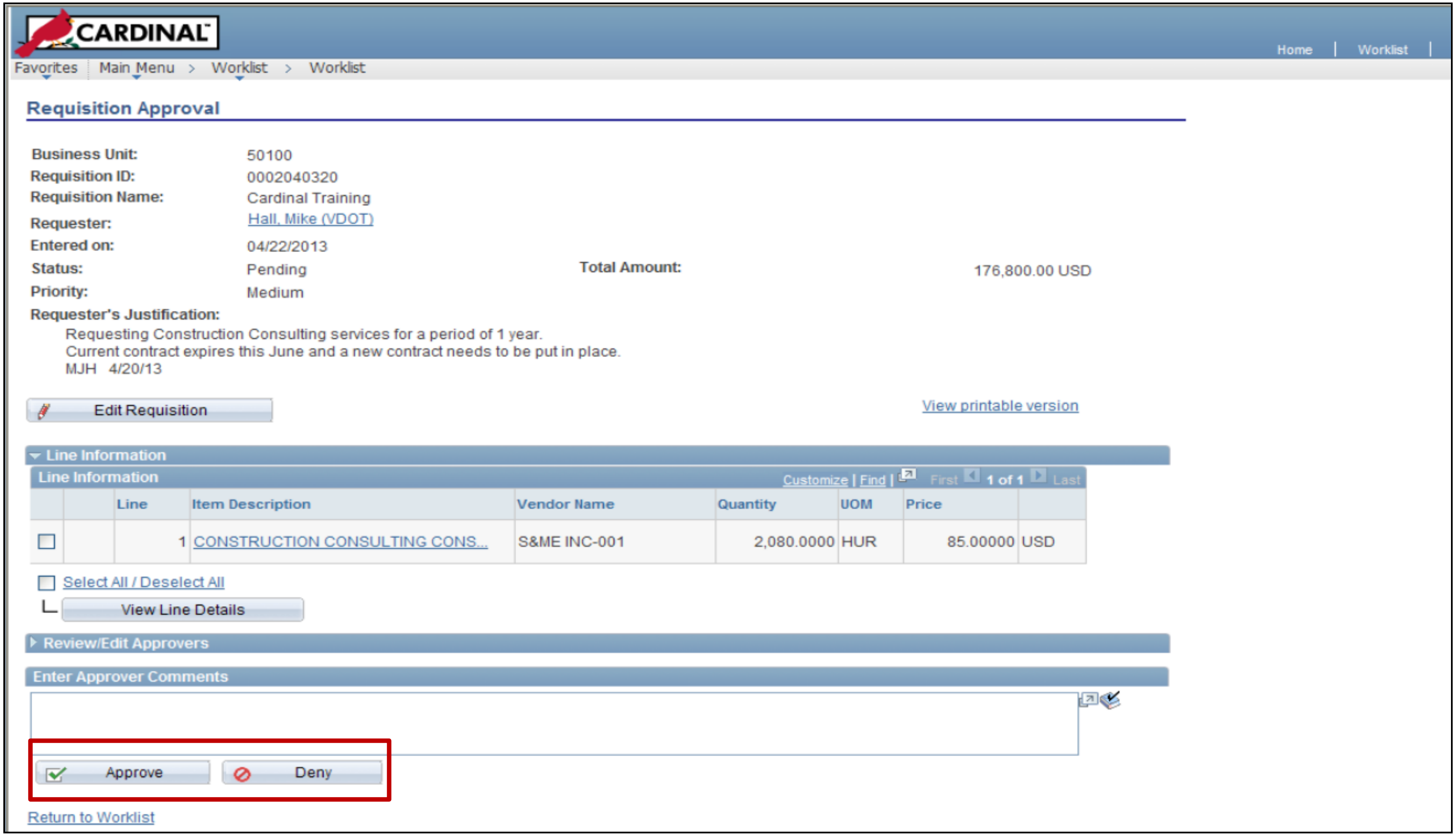
If/When **Multiple Approvers** is shown, click on the hyperlink to view the listing of persons that are able to approve. The item will be present on each approver's worklist for action.

Once approved by any one of the approvers, it will fall off all worklists and move on as assigned.





Requisition Approval Steps (continued)



Simulation: Approving Requisitions

You are now about to view a simulation on approving a requisition. Click the Cardinal logo below to start the simulation.

Lesson 2: WebIMS Requisition Approval

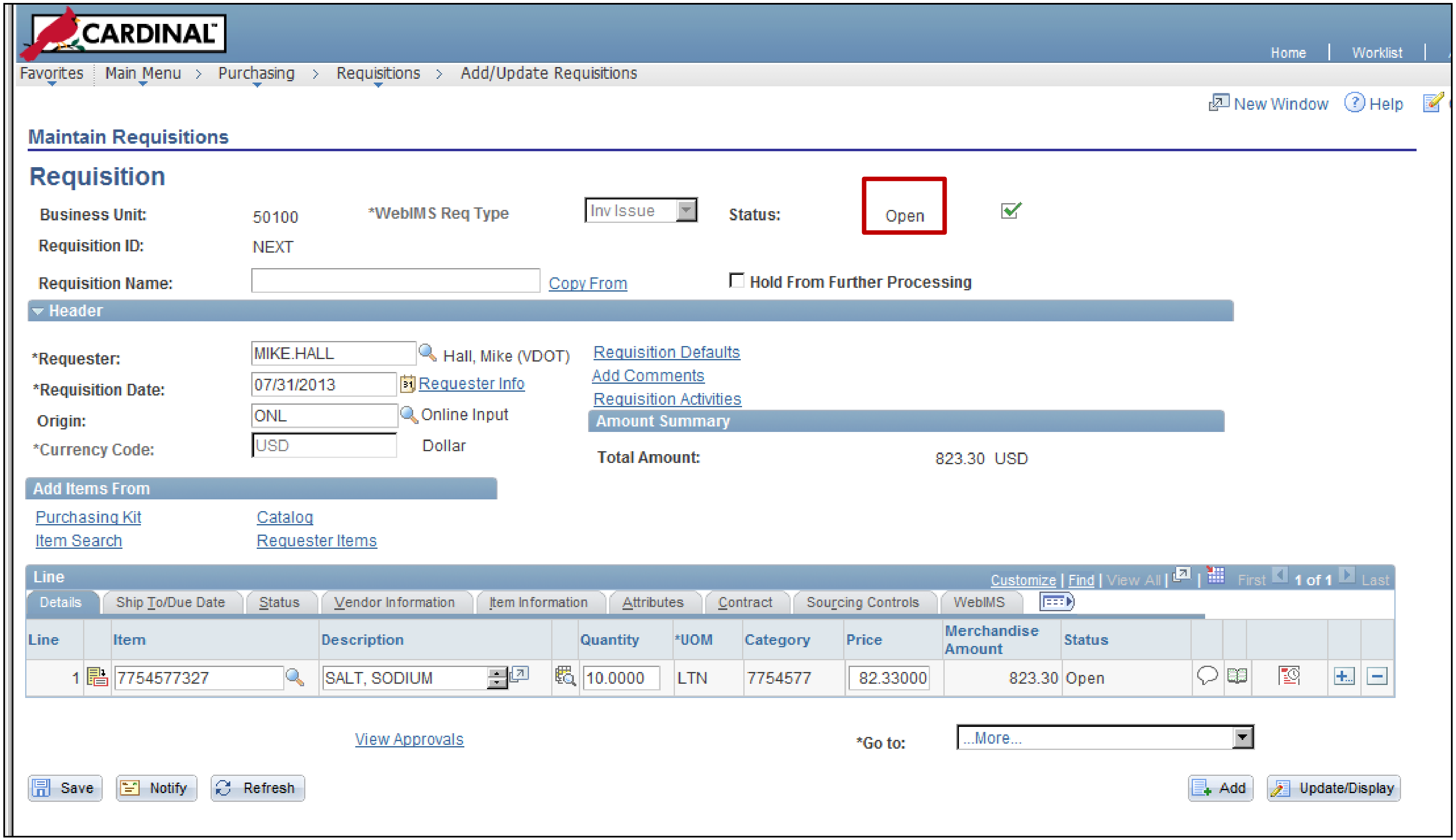
The following are categorized as WebIMS Requisition Types:

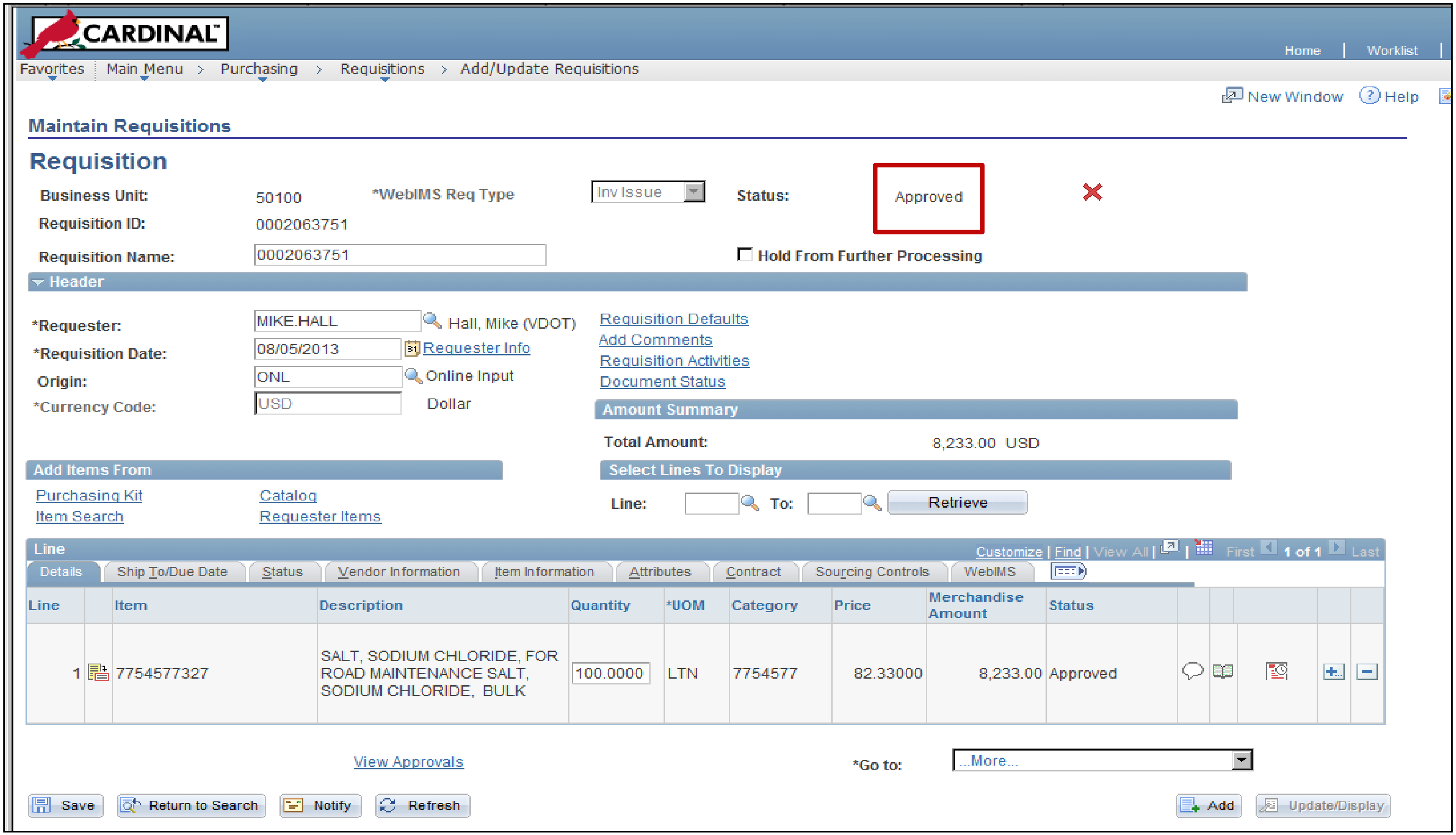
- Issuance
  - External Sales – Non-State Agency
  - External Sales – State-Agency
  - Work in Progress (WIP)
- Restock

Issuance requisitions, External Sales, and Work in Progress do not require a workflow approval process. They are automatically approved once the **Submit for Approval** button is clicked by the Storekeeper.

Restock requisitions require a workflow approval process, which follows the same process as a regular requisition as previously shown.

WebIMS Requisition Approval Steps (continued)




CARDINAL
Home | Worklist
Favorites Main Menu > Purchasing > Requisitions > Add/Update Requisitions
New Window Help
Maintain Requisitions
Requisition
Business Unit: 50100
*WebIMS Req Type Inv Issue
Status: Approved
Requisition ID: 0002063751
Requisition Name: 0002063751
Hold From Further Processing
Header
*Requester: MIKE.HALL Hall, Mike (VDOT)
*Requisition Date: 08/05/2013 Requester Info
Origin: ONL Online Input
*Currency Code: USD Dollar
Requisition Defaults
Add Comments
Requisition Activities
Document Status
Amount Summary
Total Amount: 8,233.00 USD
Add Items From
Purchasing Kit
Catalog
Item Search
Requester Items
Select Lines To Display
Line: To: Retrieve
Line
Customize | Find | View All | First 1 of 1 Last
Details Ship To/Due Date Status Vendor Information Item Information Attributes Contract Sourcing Controls WebIMS
Line Item Description Quantity *UOM Category Price Merchandise Amount Status
1 7754577327 SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK 100.0000 LTN 7754577 82.33000 8,233.00 Approved
View Approvals
*Go to: ...More...
Save Return to Search Notify Refresh
Add Update/Display

Lesson 3: Purchase Order and Change Order Approval

A request for approval is triggered when a buyer submits a Purchase Order (PO) for approval. Only POs created directly in Cardinal require approval; POs created from a requisition, from SiteManager, or from eVA do not.

Cardinal sends each approver an email notification when a PO is ready for approval processing. In addition, Cardinal sends a reminder e-mail to the supervisor if the PO is not worked within 24 hours. All POs that require approval processing also appear on the worklist.

The Supervisor approves the PO by going to their worklist and clicking on the link provided to access the PO.

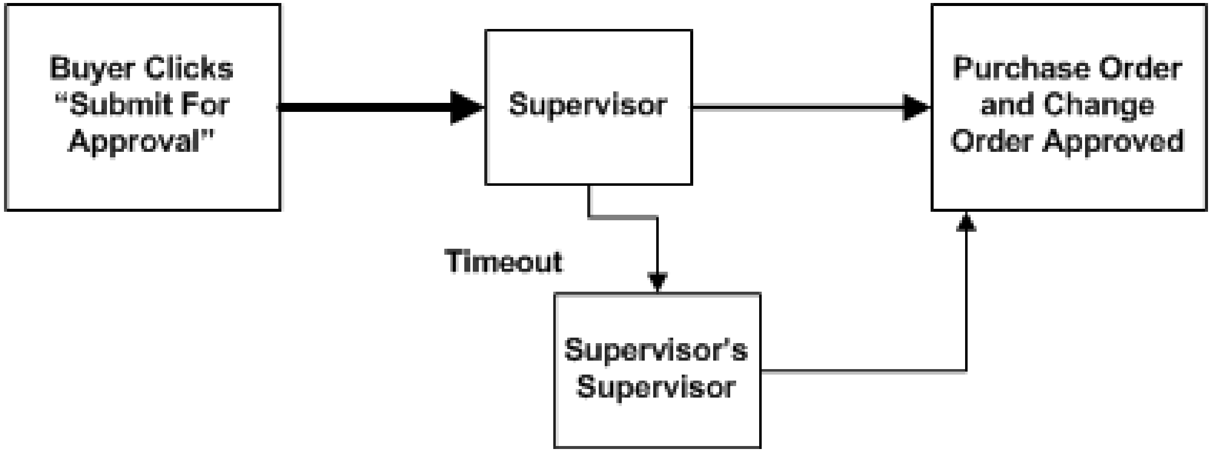
POs can be accessed online, or from the worklist link, or from the email notification link.

Any change to POs that affect the **Quantity**, **Price**, or **Ship To** fields are called change orders. Change orders also require approval.

Purchase Order Approval

A PO's approval process depends on how it was created:

- **POs created directly in Cardinal (one level)**: Are approved by the buyer's Supervisor. The Supervisor can approve, deny, or hold the PO.
  - Cardinal sends a reminder e-mail if the PO is not worked within 24 hours.
  - If a PO is not approved within 48 hours, workflow routes the PO to the Supervisor of the Supervisor. The Supervisor of the Supervisor can approve, deny, hold or push back the PO.
  - The buyer receives an email notification if the PO is approved.
- **POs created from a Cardinal requisition:** Do not need approval since they have already been approved on a requisition. These POs will not appear on any approver's worklist.
- **POs created in Cardinal through the SiteManager interface or the eVA interface:** Do not need approval in Cardinal. These are approved in the Source system.



Purchase Order Approval (continued)

POs can be approved online, or from the worklist link or from the email notification link.

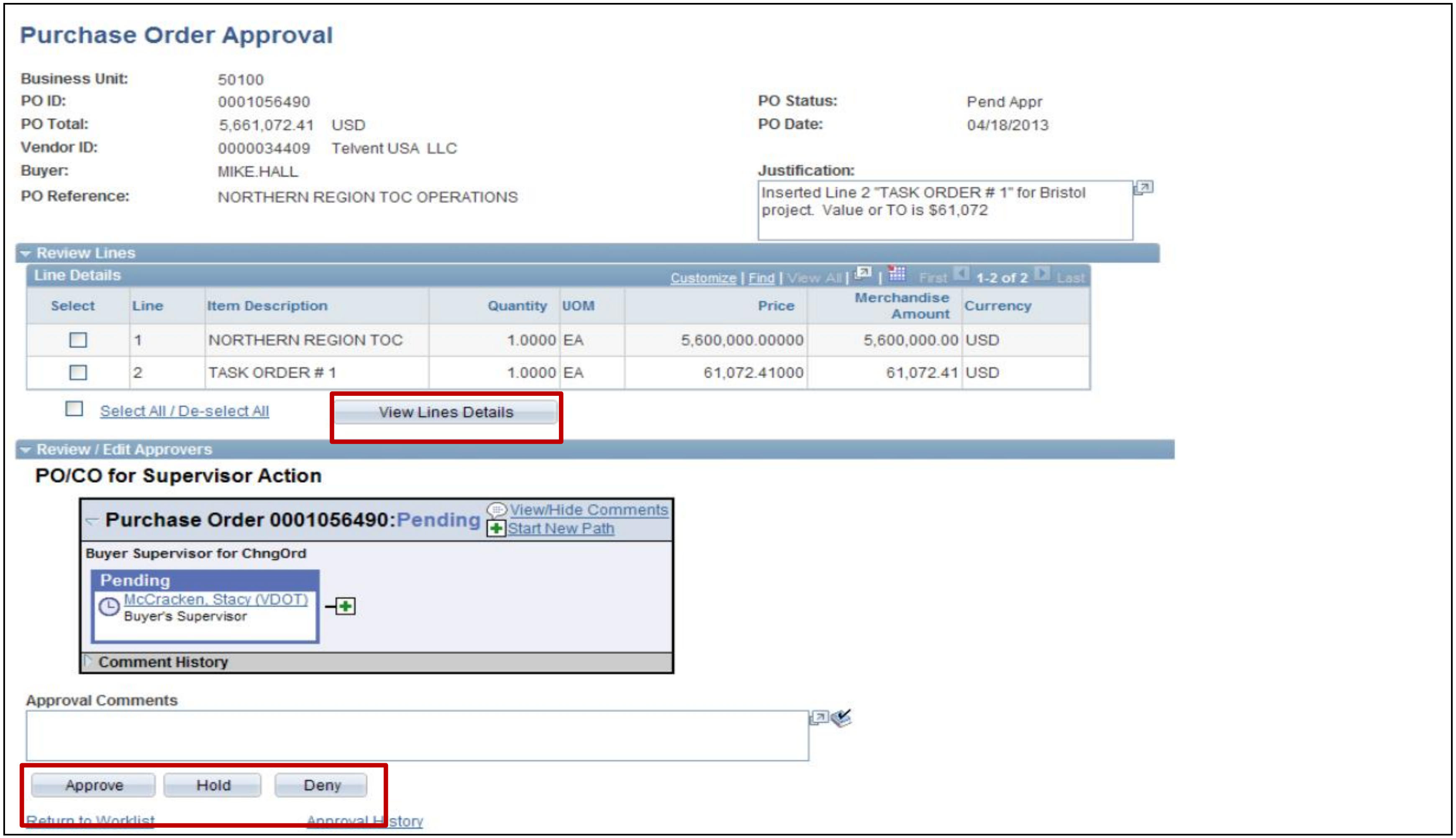
You can navigate to the worklist through the following path:

Main Menu > Worklist > Worklist

To approve a PO:

- Search for the PO you want to approve, click on the relevant link in the worklist to access the PO.
- Click the **View Line Details** button to view details. Review all details based on relevant policies.
- There are three options**:**
  - To approve the PO, click the **Approve** button.
  - To deny the PO, click the **Deny** button. The user is then notified by email and can edit and resubmit the PO. It then goes through the approval process again.
  - To put the PO on hold, click the **Hold** button. Placing a transaction on hold reserves it for later action related to approval. The hold feature also allows you to prevent other approvers from taking action on the item. The item will not time out while on hold.

Change Order Approval (continued)



Purchase Order Approval

Business Unit:	50100		
PO ID:	0001056490	PO Status:	Pend Appr
PO Total:	5,661,072.41 USD	PO Date:	04/18/2013
Vendor ID:	0000034409 Telvent USA LLC		
Buyer:	MIKE.HALL	Justification:	
PO Reference:	NORTHERN REGION TOC OPERATIONS		Inserted Line 2 "TASK ORDER # 1" for Bristol project. Value or TO is $61,072

Review Lines

Line Details — Customize | Find | View All | First 1-2 of 2 Last

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
☐	1	NORTHERN REGION TOC	1.0000	EA	5,600,000.00000	5,600,000.00	USD
☐	2	TASK ORDER # 1	1.0000	EA	61,072.41000	61,072.41	USD

☐ Select All / De-select All   View Lines Details

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001056490:Pending   View/Hide Comments   Start New Path

Buyer Supervisor for ChngOrd

Pending
McCracken, Stacy (VDOT)
Buyer's Supervisor

Comment History

Approval Comments

Approve   Hold   Deny

Return to Worklist   Approval History

Change Order Approval

Changes to a PO (change orders) also go through an approval process when certain conditions are met. Please note change orders created from eVA or from SiteManager do not require additional approval. A request for approval is triggered when a buyer submits a change order for approval.

Cardinal sends the approver an e-mail notification when a change order is ready for approval processing. All change orders that require approval processing appear on the worklist. Levels of approval depend on the value of the change order and/or of the original PO. Cardinal sends a reminder e-mail if the change order is not worked within 24 hours.

The approver approves the change order either online, from the worklist link or from the email notification link.

Cardinal uses change orders to track changes made to a PO. Cardinal compares the originally approved PO amount to the new PO amount. If a PO is changed multiple times, the difference is evaluated using the originally approved PO amount and all change orders that have been applied.

Please note that SiteManager and eVA Purchase Order Change Orders are approved prior to being interfaced into Cardinal.

Change Order Approval (continued)

POs that have change orders attached to them go through a specific approval process that depends on the difference between the originally approved PO amount, the change order amount: or adding a line.

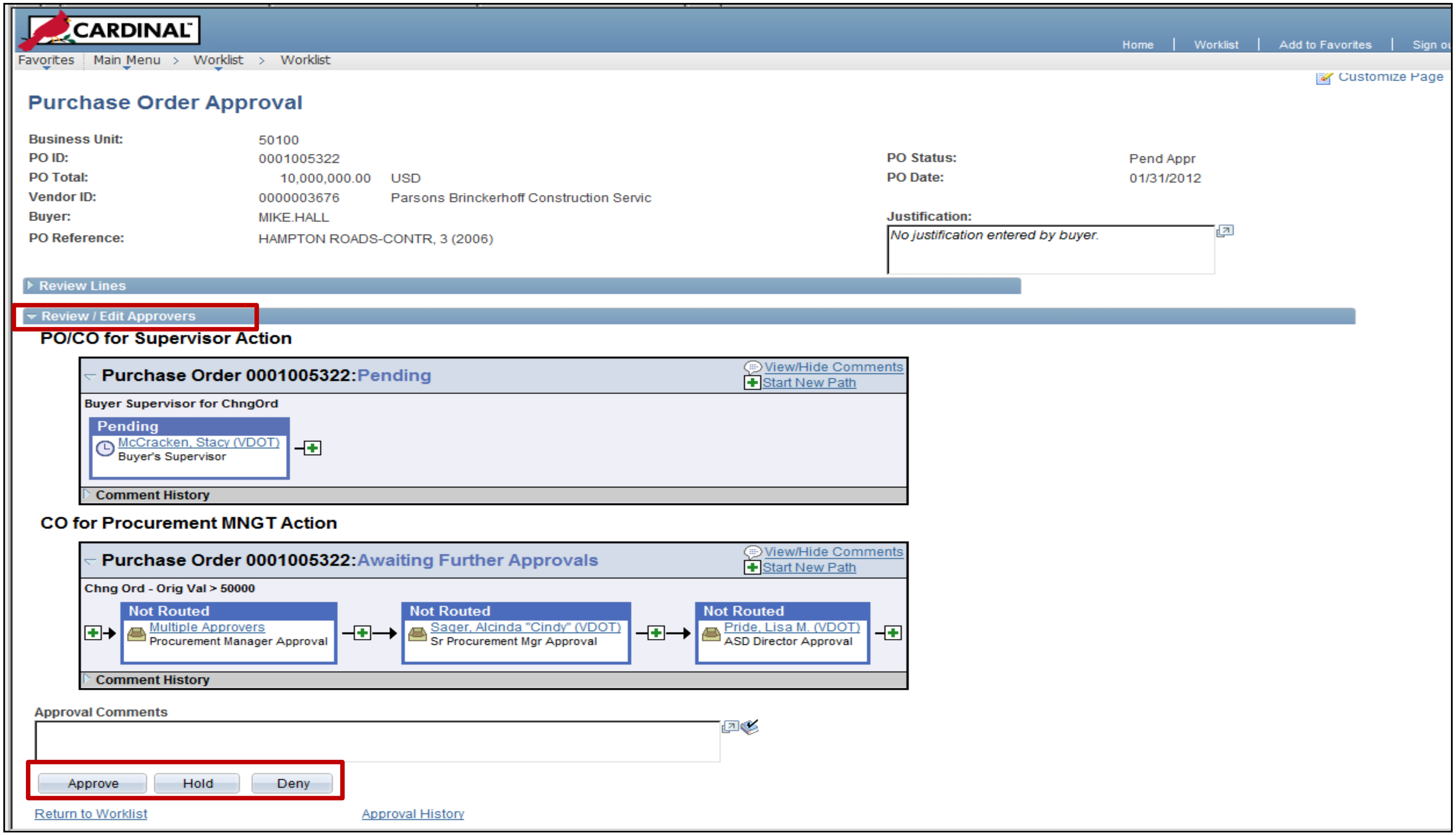
- **Route to Supervisor (one level only)**
  - All change orders: With an original PO value of less than $50,000 and that contain a change of 25% or more from the original value of the PO.
  - All change orders: With an original PO value of more than $50,000, that contain a change of 25% or more from the original value of the PO, and with a change amount of less than $50,000.

Change Order Approval (continued)

- **Route to Supervisor, Procurement Manager, Senior Procurement Manager, and Administrative Services Division (ASD) Director (four levels of approval)**
    - All change orders: With an original PO value of $50,000 to $199,999.99 with a change amount of $50,000 or more.
    - All change orders: With an original PO value of $200,000 or more, that contain a change of 25% or more from the original value of the PO.
    - Procurement Managers (second level), Senior Procurement Managers (third level), and ASD Directors (fourth level) are part of a pooled approvers list. A change order that requires approval at the second, third and fourth level of approval is directed to all of the approvers in that pool for each respective level of approval. Any approver in the pool can take action on the change order; the change order approval appears on all of their worklists. When one of the approvers completes an action on the change order, it is removed from all of the approvers' worklists, since it has been worked.

If none of the change order conditions above are met, no routing or approvals are required for the change order.

Purchase Order Approval (continued)



Simulation: Approving Purchase Orders

You are now about to view a simulation on approving or denying a purchase order. Click the Cardinal logo below to start the simulation.

Lesson 4: Strategic Sourcing Event Collaboration

A Collaborator can be added at the beginning or at the end of an event to provide input.

A request for collaboration is triggered when an event creator (Strategic Sourcing Buyer) invites one or several Collaborators to provide input for an event.

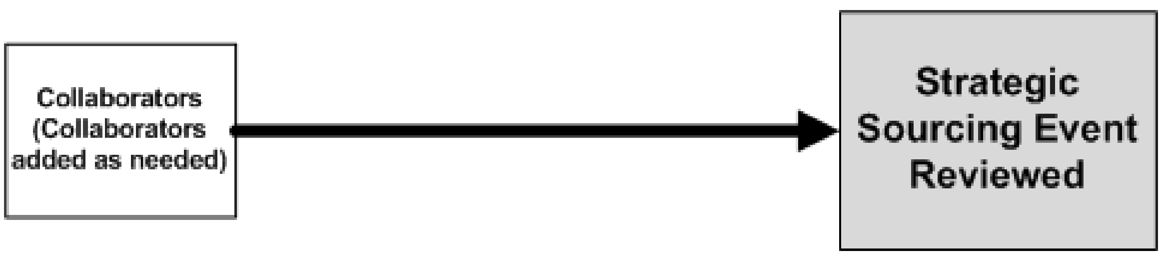
Cardinal sends an email notification to the first Collaborator set up in the routing sequence assigned on the event. This email notifies the collaborator that their input has been requested for the event. Other Collaborators set up for the event receive a worklist and email notifications only once the previous Collaborators complete their analysis.

Each Collaborator accesses the event to provide input to the event either from the worklist link, from the email notification link, or from the **Analyze Events** page.

Strategic Sourcing Event Collaboration (continued)

Strategic Sourcing Events can have one or several Collaborators invited by the Strategic Sourcing Buyer when creating the event.   Collaboration may be required for solicitations above the buyer's delegated authority. Each Collaborator completes their input following the routing sequence assigned to the event.

To learn more about Collaboration, please refer to the **Strategic Sourcing Collaboration** job aid.



Strategic Sourcing Event Collaboration (continued)

Each Collaborator provides input to the event either accessing it from the worklist link, from the email notification link, or from the **Analyze Events** page.

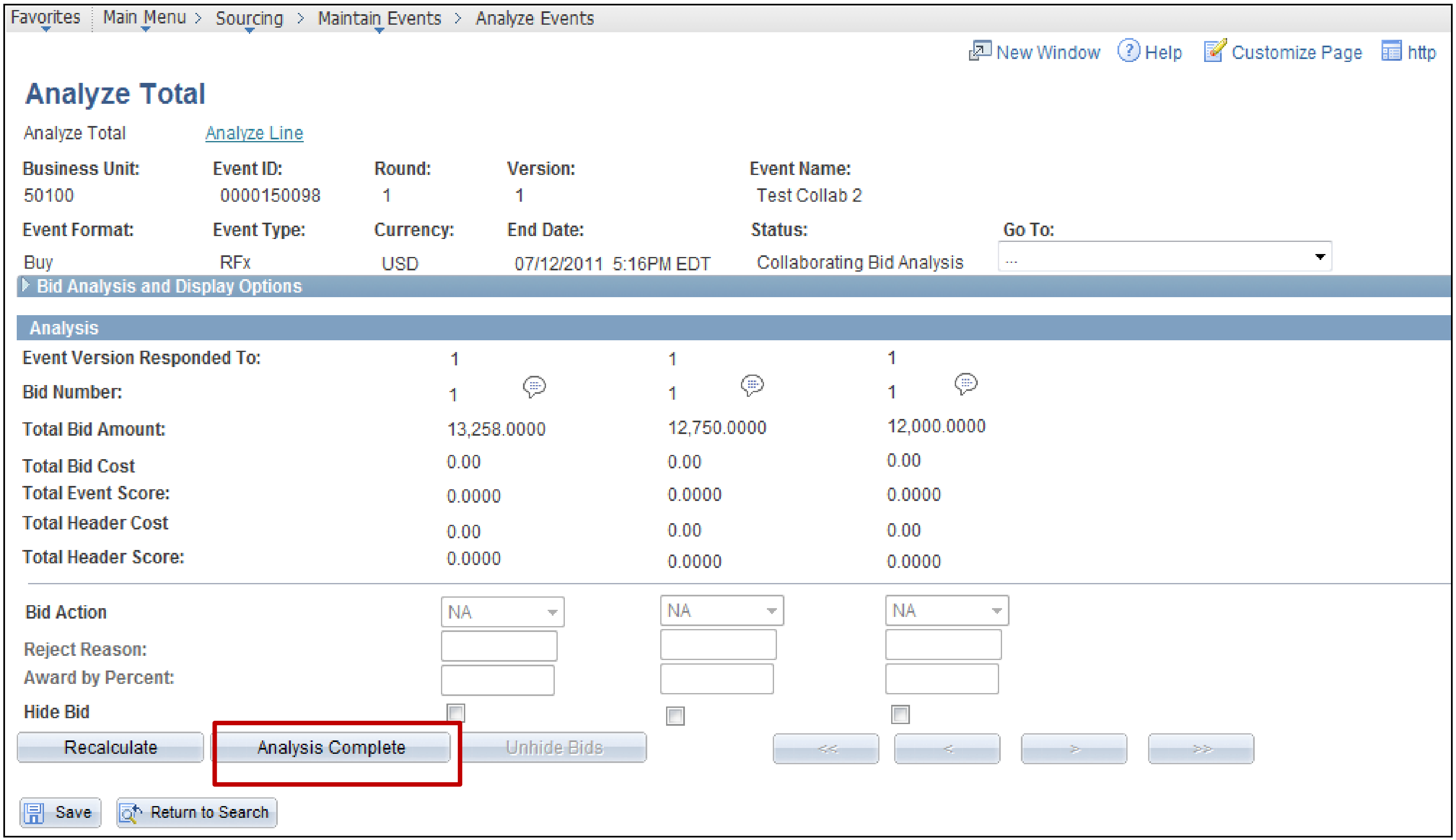
You can navigate to the **Analyze Events** page through the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

To provide input to the Strategic Sourcing event:

- Search for the event you need to provide input for on the **Analyze Events** page.
- Review all details based on relevant policies.
- Click the **Analysis Complete** button. This completes your review and marks your collaboration as complete. Clicking this button also routes the event to the next Collaborator in the routing sequence assigned to the event, if applicable.
- If the due date has past and no action has been taken, an email notification and worklist item are sent to the event creator.

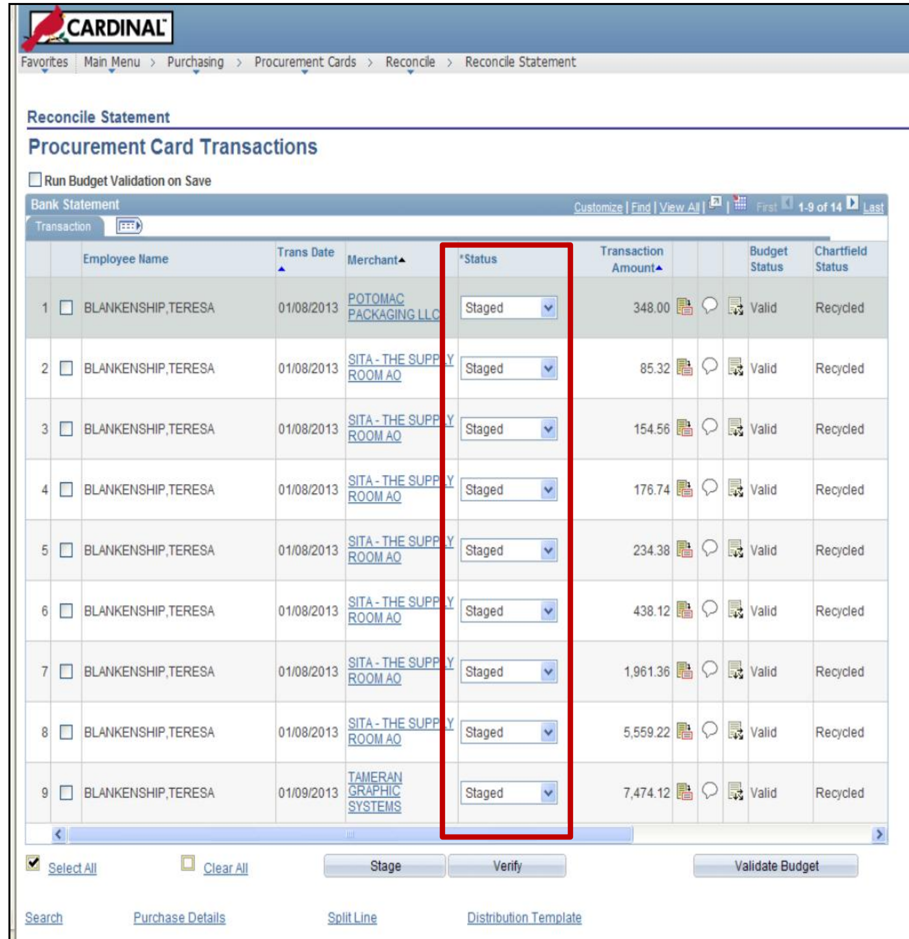
Strategic Sourcing Event Collaboration (continued)



Lesson 5: PCard Approval

PCard transactions are loaded into Cardinal each day from an electronic file that is sent in by the bank. The initial status of the transaction is **Staged**.

The PCard Holder must reconcile each transaction, as soon as possible, to ensure timely approval by their Supervisor.



PCard Approval (continued)

A request for approval is triggered when a PCard Holder changes a PCard transaction status from **Staged** to **Verified.**

An alert on the **PCard Verified Charges by User** pagelet shows that the PCard transaction is ready for approval processing. All PCard transactions that require approval processing appear on the pagelet.

Note: Approvers should regularly refresh the pagelet to see which items they need to process for approval.

The approver must notify the user of any items not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

The Supervisor who is associated to the card approves the PCard on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.

You can navigate to the **Reconcile Statement** page through the following path:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement

Note: Additional information about PCard processing is in the **Using PCards** course.

PCard Approval (continued)

CARDINAL

Favorites | Main Menu

Personalize Content | Layout

PCard Verified Charges by User

Name	Trans Date	Merchant	Sum Amount
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	12105.6
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	85.62
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	126.91
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	38.86
Tudor,Jacob	2011-01-27	PRSMOKE	69.48
Tudor,Jacob	2011-01-27	PRSMOKE	570

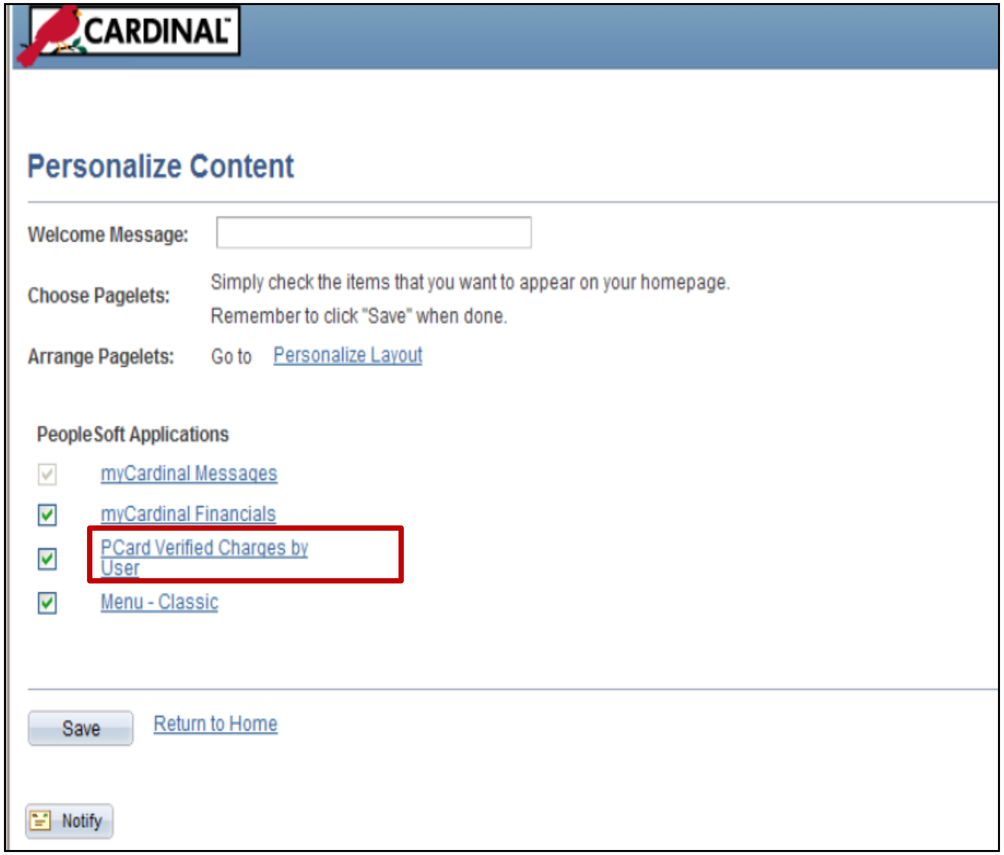
PCard Pagelet

Each PCard approver must set up the appropriate pagelet in order to process PCard approvals. Please note that this pagelet contains that both PCard and ISSP transactions share the same pagelet.

The steps to set up the pagelet are:

- From the Cardinal Home Page, click on **Personalize Content**.
- Click the checkbox for **PCard Verified Charges by User** to select it, then click **Save**.

Refresh and check this pagelet daily, and take appropriate action (i.e., approve or deny the transactions).



PCard Approval (continued)

PCard transactions require one level of approval:

- **PCard Supervisor**: The Supervisor(s) who is associated to the card (i.e. may not the user's Supervisor) is the only level of approval.
  - This approver can approve the transaction, enter a dispute amount if the amount is incorrect, or notify the user if there is an issue with the transaction.
  - Cardinal does not generate an automatic email to the PCard Holder when a PCard transaction is approved. The approver must do so manually. Users can also search for their transaction in Cardinal and check on its approval status.

PCard Approval (continued)

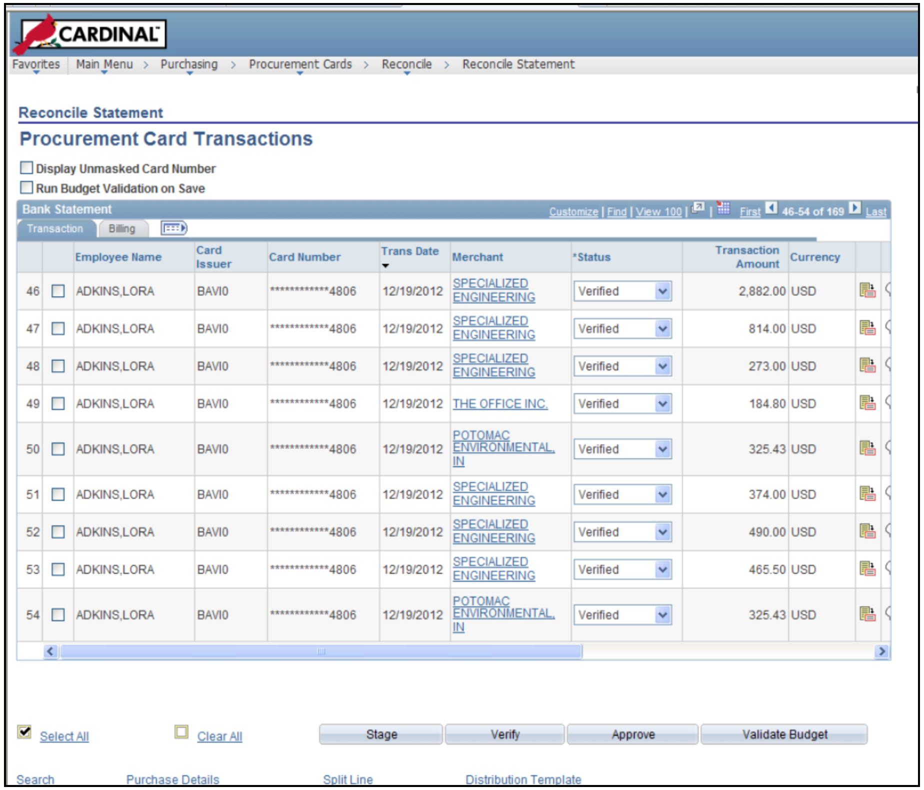
PCard transactions are approved on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.

You can navigate to the pagelet through the following path:

Main Menu > PCard Verified Charges by User (the pagelet can be accessed on the Home page as shown previously)

The following path is an alternative path to the **Reconcile Statement** page:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile Statement



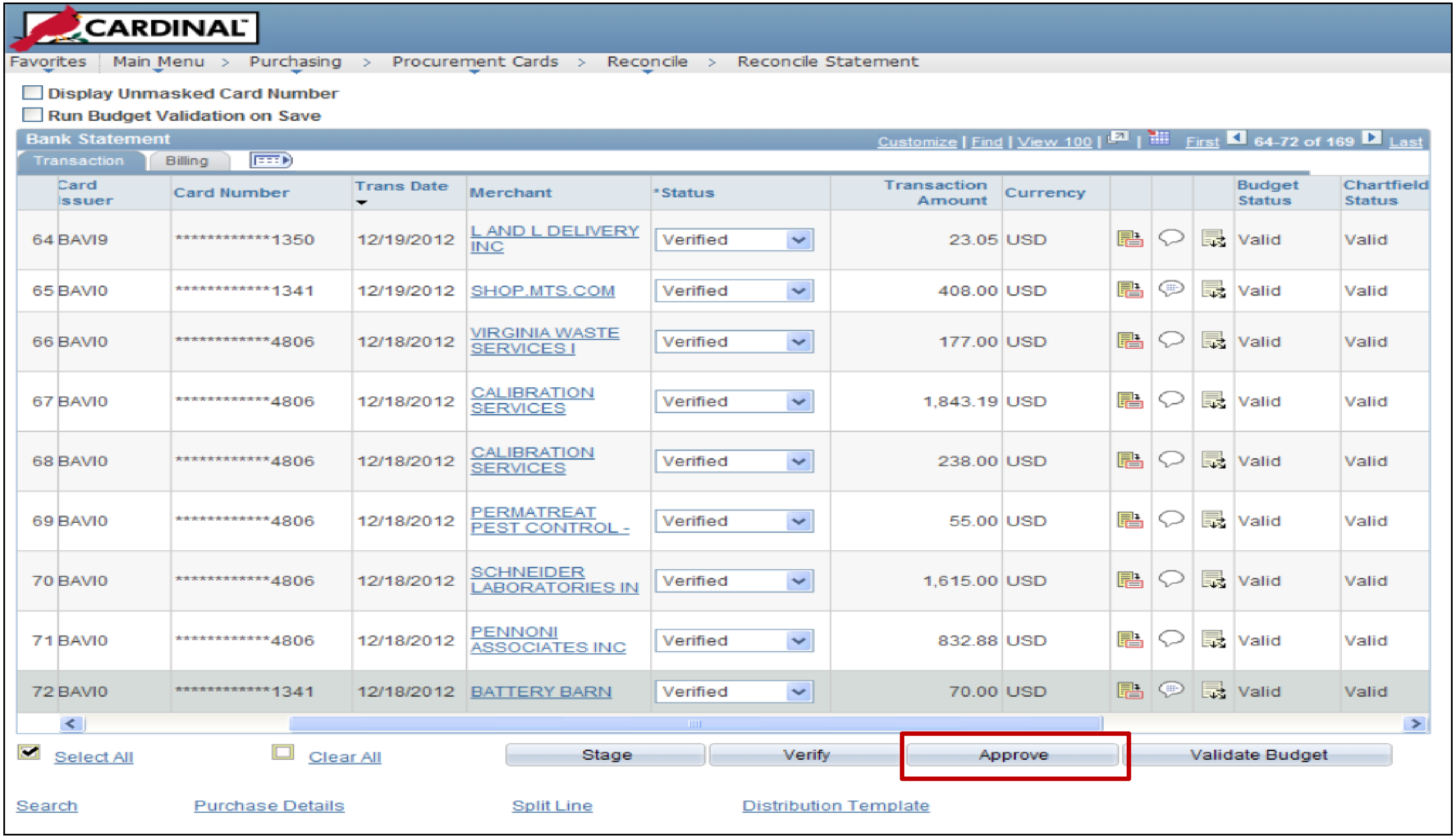
PCard Approval Steps

To approve a PCard transaction:

- Click on the link for the transaction you wish to review in the **PCard Verified Charges by User** pagelet.
- Review all details based on relevant policies.
- You have two options:
    - Click on the **Approve** button to submit your approval.
    - If the transaction amount is incorrect, you can enter a dispute amount for the transaction.
        - On the **Billing** tab, enter the dispute amount for the transaction in the **Dispute Amount** field.
        - Click the **Comment** icon on the **Transaction** tab to enter a comment about the transaction. The comment should explain why the transaction is being disputed.
        - Then set the transaction status to **Approved.**
- Notify the user of any items you do not approve in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

Approved transactions are transmitted to FleetFocus M5 (Equipment Management System) and also to the Accounts Payable module where vendor payments are processed. The agency pays the full amount and receives a credit for the amount you dispute, if it is correct.

PCard Approval Steps (continued)



Simulation: Approving PCard Transactions

You are now about to view a simulation on how to approve a PCard transaction. Click the Cardinal logo below to start the simulation.

Lesson 6: ISSP Approval

Note: ISSP transactions are processed through the Cardinal PCard process.

A request for approval is triggered when an ISSP Reconciler changes an ISSP transaction status from **Staged** to **Verified.**

Users only see transactions that are associated to an ISSP location they have been assigned to. An alert on the **PCard Verified Charges by User** pagelet shows that the ISSP transaction is ready for approval processing. All ISSP transactions that require approval processing appear on the pagelet. **Approvers should regularly refresh the pagelet to see which items they need to process for approval.**

The approver must notify the user of any items not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

The ISSP Manager who is associated to the ISSP location approves the transaction on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet.

Note: Additional information about ISSP processing is provided in the **Mancon** job aid.

ISSP Approval (continued)

CARDINAL

Favorites Main Menu

Personalize Content | Layout

PCard Verified Charges by User

Name	Trans Date	Merchant	Sum Amount
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	12105.6
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	85.62
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	126.91
Bristol,District	2011-01-04	MANAGEMENT CONSULTING INC	38.86

ISSP Approval (continued)

Each ISSP approver must set up the appropriate pagelet in order to process ISSP approvals. Please note that this pagelet contains both PCard and ISSP transactions.

The steps to set up the pagelet are:

- From the Cardinal Home Page, click on **Personalize Content**.
- Click the checkbox for **PCard Verified Charges by User** to select it, then click **Save**.

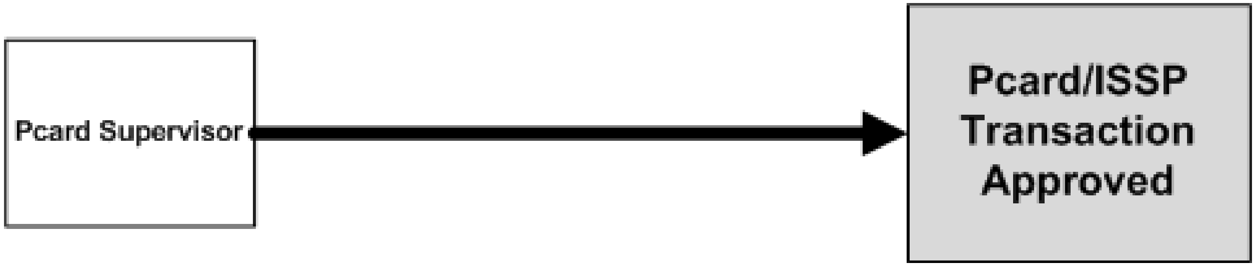
Refresh and check this pagelet daily, and take appropriate action (i.e., approve or deny the transactions).

ISSP Approval (continued)

ISSP Approval (continued)

ISSP transactions require one level of approval:

- **ISSP Manager**: The ISSP Manager who is associated to the card (i.e. not the user's Supervisor) is the only level of approval.
  - This approver can approve the transaction, enter a dispute amount if the amount is incorrect, or notify the user if there is an issue with the transaction
  - Cardinal does not generate an automatic email to the PCard Holder when the ISSP transaction is approved. The approver must do so manually, if necessary. Users can also search for their transaction in Cardinal and check on its approval status.



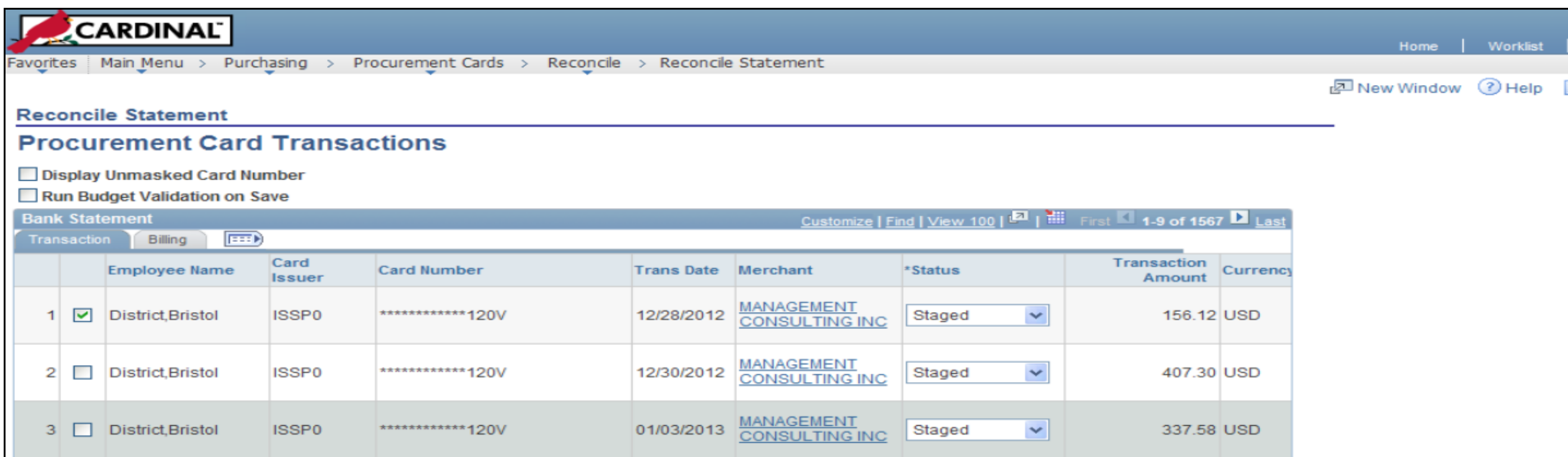
ISSP Approval (continued)

ISSP transactions are approved on the **Reconcile Statement** page, which can be accessed through **PCard Verified Charges by User** pagelet. You can navigate to the pagelet through the following path:

Main Menu > PCard Verified Charges by User (the pagelet can be accessed on the Home page as shown previously)

The following path is an alternative path to the **Reconcile Statement** page:

Main Menu > Purchasing > Procurement Cards > Reconcile > Reconcile



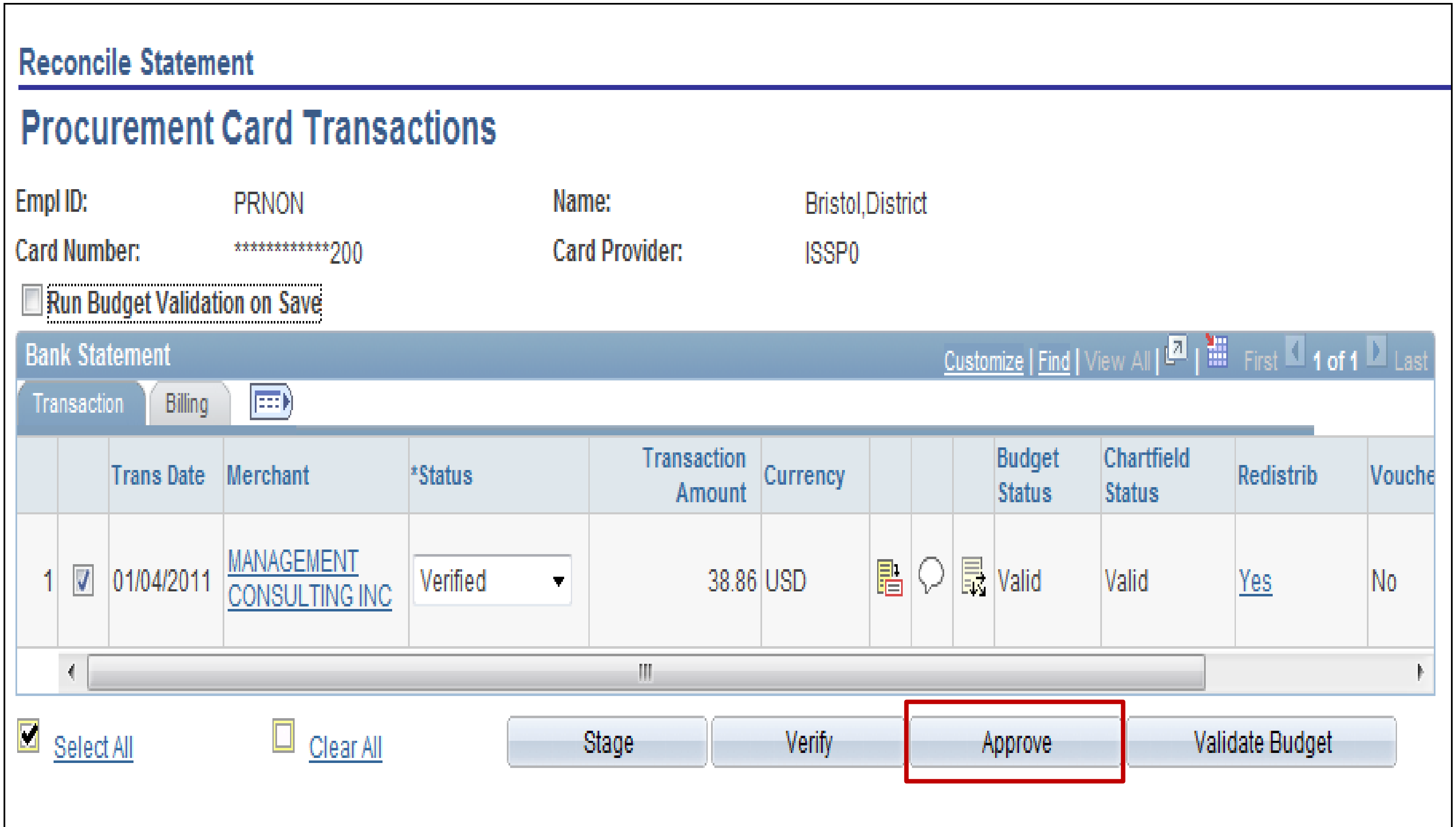
ISSP Approval Steps

To approve an ISSP transaction:

- Click on the link for the transaction you wish to review in the **PCard Verified Charges by User** pagelet.
- Review all details based on relevant policies.
- You have two options:
  - Click on the **Approve** button to submit your approval.
  - If the transaction amount is incorrect, you can enter a dispute amount for the transaction.
    - On the **Billing** tab, enter the dispute amount for the transaction in the **Dispute Amount** field.
    - Click the **Comment** icon on the **Transaction** tab to enter a comment about the transaction. The comment should explain why the transaction is being disputed.
    - Then set the transaction status to **Approved.**
    - The agency pays the full amount and receives a credit for the amount you dispute, if it is incorrect.
- Notify the user of any item not approved in order to resolve the issue. Cardinal does not automatically notify users when items are not approved.

Approved transactions are transmitted to FleetFocus M5 (Equipment Management System) and also to the Accounts Payable module where vendor payments are processed. Please note that ISSP transactions are paid on verified

ISSP Approval Steps (continued)



Lesson 7: Procurement Contract Approval

All Procurement contracts entered in Cardinal require approval. A contract is ready for approval after the Purchasing Contracts Administrator has created the contract and reviewed it.

The Purchasing Contracts Administrator then sets the Procurement contract Status to **Approved** to allow transactions to be processed against the contract. There is no workflow notification associated with contracts.

The Purchasing Contracts Administrator approves the contract on the **Add/Update Contracts** page. See the **Entering Procurement Contracts** course for more information about procurement contracts.

Procurement Contract Approval (continued)

Procurement contracts require one level of approval.

- **Purchasing Contracts Administrator**: Follow the appropriate agency policies and procedures for any manual evaluation, processing, and approval required for contract approval.

Procurement Contract Approval Steps

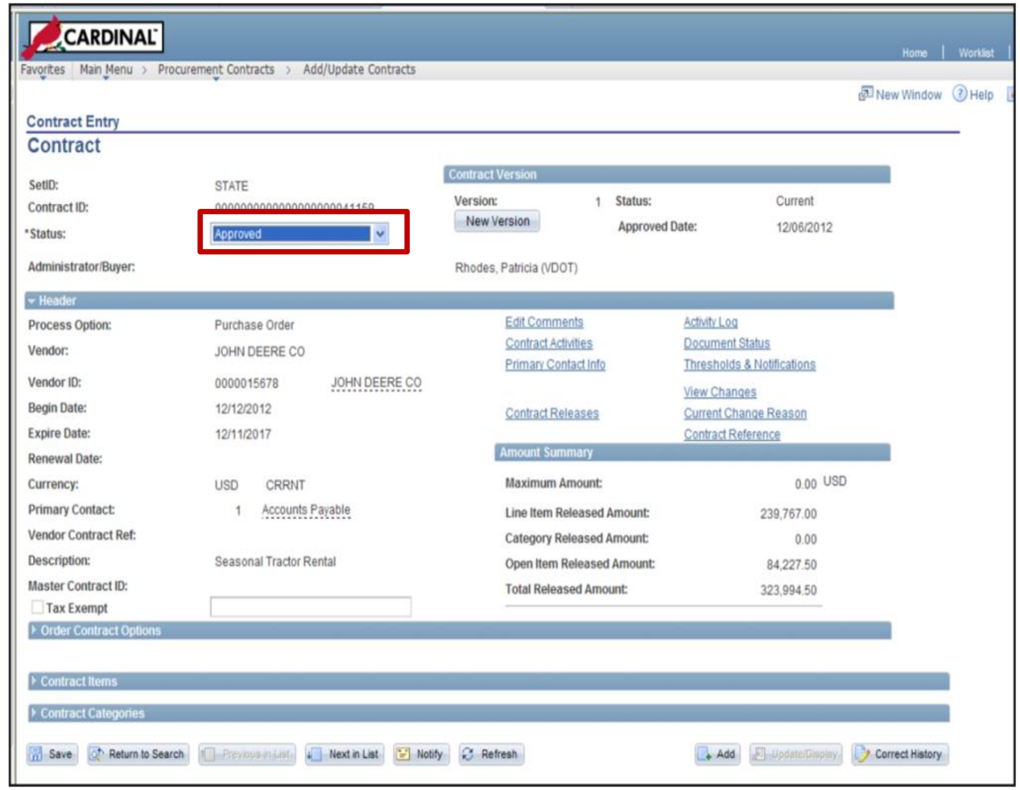
Procurement contracts are approved on the **Add/Update Contracts** page.

You can navigate to this page through the following path:

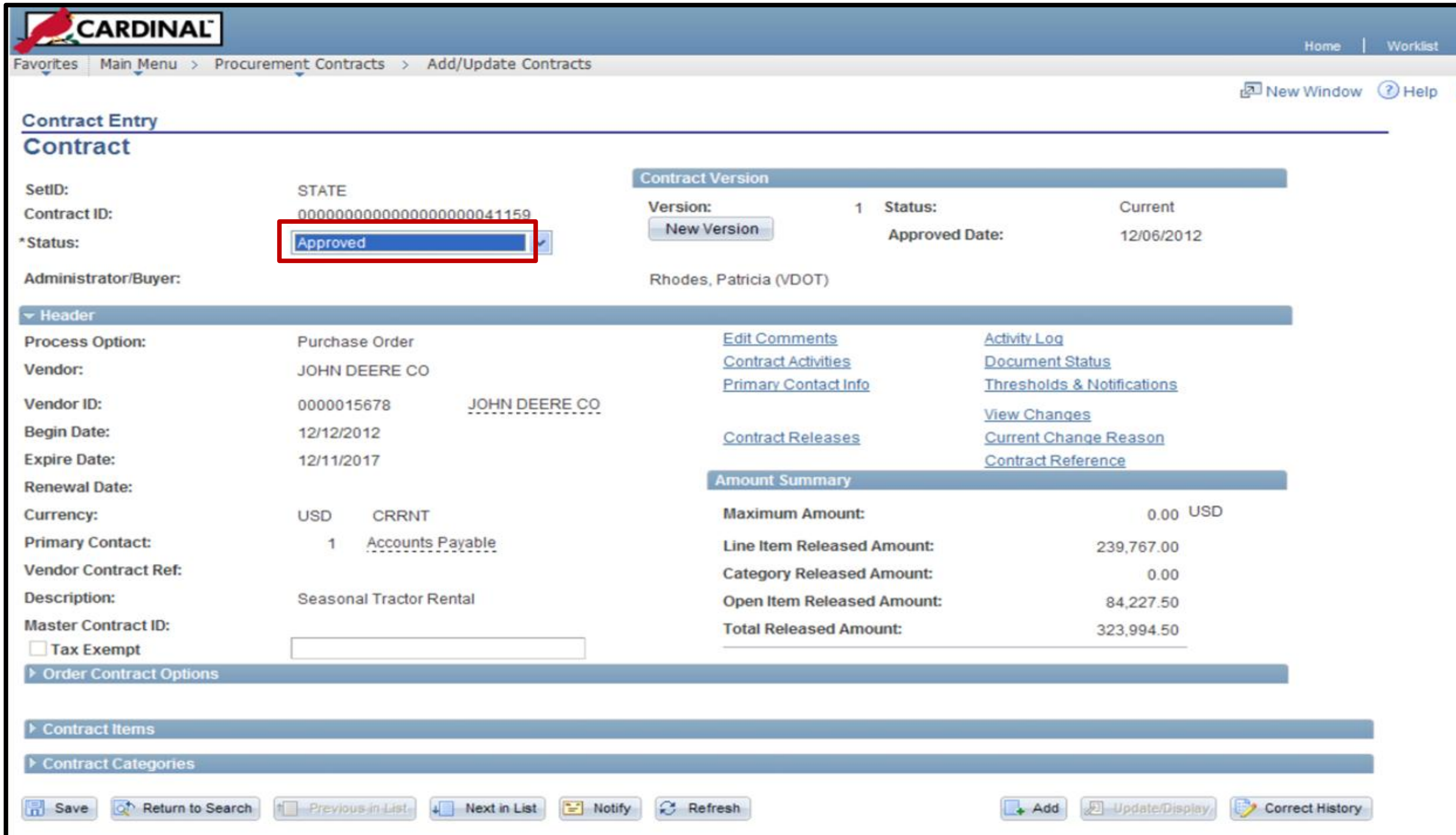
Main Menu > Procurement Contracts > Add/Update Contracts

To approve a Procurement contract:

- To approve the contract click the **Status** drop-down box, select **Approved**, and then **Save.**
- If a threshold was met, updates to the contract may also be needed and the contract will need to be reapproved. For example, if the contract's expiration date has expired and it is updated, the contract will need to be reapproved.



Procurement Contract Approval Steps (continued)



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the questions, select your answers and click **Submit** to see if you chose the correct response.

Approvers can approve or deny parts of a requisition or purchase order?

- True
- False

Which of the following Procurement items are approved through a pagelet?

- Requisitions
- Contracts
- PCard and ISSP transactions
- None, they are all approved on the page or through the worklist

Course Summary

In this course, you learned:

- Issuance requisitions do not require a workflow approval process. They are automatically approved once the **Submit for Approval** button is clicked. Restock requisitions require a workflow approval process, which follows the same process as a regular requisition.
- Requisitions and POs time out, i.e. they route to the next approver or to the approver's Supervisor for processing if not processed within 48 hours.
- Change orders have different levels of approval, depending on the amount of the difference from the originally approved PO.
- A collaborator can be added at the beginning or at the end of a Strategic Sourcing event to provide input into the event.
- PCard and ISSP transactions are approved from a pagelet or directly from the **Reconcile Statement** page. Approvers must set up the **PCard Verified Charges by User** pagelet in order to access items for approval from the pagelet. Approvers should check and refresh this pagelet daily, and process the items listed.
- The Purchasing Contracts Administrator sets the Procurement Contract to **Approved** to allow transactions to be processed against the contract. There is no workflow associated with contracts.

Course Evaluation

Congratulations! You have completed the **PROC343: Procurement Approvals** course. Please use the evaluation link to assess this course.

Click here to access the survey

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the Exit Course button.